DOCUMENT RESUME

ED 388 802 CE 070 191

AUTHOR Kerka, Sandra
TITLE The Learning Organization. Myths and Realities.
INSTITUTION ERIC Clearinghouse on Adult, Career, and Vocational Education, Columbus, Ohio.
SPONS AGENCY Office of Educational Research and Improvement (ED), Washington, DC.
PUB DATE 95
CONTRACT RR93002001
NOTE 4p.
PUB TYPE Information Analyses - ERIC Clearinghouse Products (071)

EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS Adult Education; Elementary Secondary Education; Employer Employee Relationship; Higher Education; *Labor Force Development; *Organizational Change; *Organizational Development; Participative Decision Making; Teamwork
IDENTIFIERS *Learning Organizations

ABSTRACT

Any type of organization can be a learning organization (LO) if it possesses certain characteristics: provide continuous learning opportunities, use learning to reach its goals, link individual performance with organizational performance, foster inquiry and dialogue, embrace creative tension as a source of energy and renewal, and be continuously aware of and interact with its environment. Businesses that practice LO principles are Johnsonville Foods, Harley-Davidson, Motorola, Corning, AT&T, and Fed Ex. Sullivan Elementary School in Tallahassee (Florida) has applied LO quality principles to transform itself. Despite theoretical support and some real-life examples, some critics claim the learning organization is a myth, not a reality. Some cite a lack of critical analysis of the theoretical framework of the LO. They suggest that few studies support the relationship between individual and organizational learning. Another critic sees the primary purpose of most organizations as the production of goods and services, not the acquisition of knowledge/learning. Schools that have been evaluated along Senge's five disciplines have also been found lacking. Barriers that prevent the LO from becoming a reality include the following: lack of effective leaders, the inability to recognize and change existing mental models, learned helplessness, tunnel vision, truncated learning, individualism, and a culture of disrespect and fear. The LO may best thought of as a journey, not a destination; a philosophy, not a program. (Contains 19 references.) (YLB)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED 388 802

The Learning Organization
Myths and Realities

Sandra Kerka

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

☐ This document has been reproduced as received from the person or organization originating it.

☐ Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

ERIC Clearinghouse on Adult, Career, and Vocational Education
Center on Education and Training for Employment
College of Education
The Ohio State University
1900 Kenny Road
Columbus, OH 43210-1090

CE070191

BEST COPY AVAILABLE

Myths and **REALITIES**

by Sandra Kerka *1995*

ERIC

Clearinghouse on Adult, Career, and Vocational Education

THE LEARNING ORGANIZATION

At least since the 1990 publication of Senge's ***The Fifth Discipline***, the concept of the learning organization (LO) has been promoted as a way to restructure organizations to meet the challenges of the coming century. What are learning organizations—in theory and in practice? Are they a real solution or the latest in a series of reform fads? The myths and realities are explored in this publication.

Getting a Grip on the Learning Organization

Of course, there is not yet a consensus on the definition of a learning organization. Any type of organization can be a learning organization—businesses, educational institutions, nonprofits, community groups. Some authors agree that LOs start with the assumptions that learning is valuable, continuous, and most effective when shared and that every experience is an opportunity to learn. LOs have the following characteristics (Calvert et al. 1994; Watkins and Marsick 1993):

- They provide continuous learning opportunities.
- They use learning to reach their goals.
- They link individual performance with organizational performance.
- They foster inquiry and dialogue, making it safe for people to share openly and take risks.
- They embrace creative tension as a source of energy and renewal.
- They are continuously aware of and interact with their environment.

Senge's "five disciplines" are the keys to achieving this type of organization: personal mastery, mental models, shared vision, team learning, and systems thinking. According to Senge, the fifth, systems thinking, is the most important and underlies the rest.

Of course, in a sense "organizations" do not learn, the people in them do, and individual learning may go on all the time. What is different about a learning organization is that it promotes a culture of learning, a community of learners, and it ensures that individual learning enriches and enhances the organization as a whole. There can be no organizational learning without individual learning, but individual learning must be shared and used by the organization (P. West 1994). The familiar litany of challenges and changes—global competition, technological advances, quality improvement, knowledge work, demographic diversity, changing social structures—is driving organizations to adapt and change. "The ability to learn faster than your competitors may be the only sustainable competitive advantage" (Murrell and Walsh 1993, p. 295).

The LO: Is Anybody Out There?

In theory, the learning organization concept is appealing. However, according to Watkins and Marsick (1993), "everyone is talking about [it] but few are living it" (p. 3). We "know a lot about learning-organization theory, but far less about how to apply it" (Calvert et al. 1994, p. 40). Nevertheless, examples can be found of LO principles in practice in the workplace and in schools. Johnsonville Foods in Sheboygan, Wisconsin, appears to have been an LO long before the label was coined. In the early 1980s, the sausage manufacturer implemented several programs based on the notion of using the business to build great people; that way, the organization cannot help but succeed (Watkins and Marsick 1993). These programs included (1) *personnel development fund*—each employee is given $100 per year for any learning activity; (2) *member interaction program*—employees (members) spend time "shadowing" other workers to learn how their jobs and those of others fit into the whole; (3) *resource center*; (4) *Personal Responsibility in Developing Excellence (PRIDE) teams* investigate quality of work life issues; and (5) *company performance share*—profit sharing is based on evaluation of individual and team performance as well as personal growth and development. According to Honold (1991), profits and productivity are up, absenteeism and turnover down, and morale is high.

Several businesses are mentioned often in the literature as practicing LO principles (Solomon 1994; Watkins and Marsick 1993), such as Harley-Davidson, Motorola, Corning, AT&T, and Fed Ex. Ford's Lincoln Continental division broke product development records, lowered quality defects, and saved millions. At Chaparral Steel, 80% of the work force is in some form of educational enhancement at any time. They now produce a ton of steel in 1.5 employee hours, compared to the national average of 6.

It should be a given that schools are "learning organizations." Duden (1993) describes how Sullivan elementary school in Tallahassee applied LO quality principles and a vision statement to transform itself. The school's core values include the following: individuals are valued, teachers are professionals, parents are partners, decision making is shared. (These values apply equally to the workplace by substituting worker, manager, customer for individual, teacher, parent.) Due to the transformation at Sullivan, teacher approval ratings are up 20%, test scores remain high, and parents are more involved.

The LO concept is not confined to established, permanent institutions. Smith and Stodden (1994) show how it can applied to an ad hoc organization. The Restructuring through Interdisciplinary Team Effort Project involved schools in improving outcomes for vocational special needs students. School teams consisting of regular, special, and vocational teachers; support staff; parents; and other stakeholders attended a summer institute to learn how to build a team-driven learning organization in their schools. The focus was on collaborative procedures "powerful enough to transform a loosely bound group of interdisciplinary stakeholders into a dynamic team of learning organizers" (p. 19) who are continually discovering how to create and improve upon the systems in their schools.

A Blurred Vision

Theoretical support and some real-life examples notwithstanding, some critics claim this emperor has no clothes. Despite Ford's success with LO principles (cited earlier), the director Fred Simon "was asked to take early retirement—some say forced out—by managers uncomfortable with the learning organization" (Dumaine 1994, p. 148). Apparently, the benefits were not explained well enough to top management, who were unprepared for the initial chaos of building an LO; people were not willing to discuss problems openly, toppling a pillar of the LO structure. GS Technologies (ibid.) used Senge's dialogue technique to get labor and management to listen to each other, but not spreading its use fast enough through the company caused fear and suspicion among excluded workers.

Jacobs (1995) and W. West (1994) cite a lack of critical analysis of the theoretical framework of the learning organization. They suggest that, apart from anecdotes, few studies support the relationship between individual and organizational learning and there is little discussion of how the individual benefits. West calls for

BEST COPY AVAILABLE

research that details conditions under which the concept is successful, types of organizations that cannot use the model, and what happens when it is imposed on the unwilling. Kuchinke (1995) thinks "the concept is being oversold as a near-universal remedy for a wide variety of organizational problems" (p. 307). He states that the primary purpose of most organizations is not to acquire knowledge/learning but to produce goods and services. He suggests that LO advocates have not taken advantage of the findings of organizational learning research.

On the school front, there is also a gap between myth and reality. Shields and Newton (1994) analyzed schools participating in the Saskatchewan School Improvement Program (SSIP) using Senge's five disciplines: (1) personal mastery—SSIP focused on action, not learning, and staff development activities were few; (2) mental models—little discussion of concepts such as school climate or leadership; (3) shared vision—some schools had a mission statement but goals were not identified and impact on students was unclear; (4) team learning—teachers paid lip service, but were not team players; and (5) systems thinking—there was more compartmentalization, "them vs. us" attitude. Isaacson and Bamburg (1992) also sized up schools along the disciplines, concluding that "it is a stinging experience to read about LOs and realize how few schools and districts fit the definition" (p. 44).

Secretarial support staff in a Canadian university (May 1994) felt their learning opportunities were restricted and learning efforts undervalued. They had fewer opportunities, less funding, and limited time off work for learning. Managers viewed only secretary-related courses as appropriate professional development. This despite the strategic plan declaring that the university is dedicated to enabling, developing, and empowering learning for all. May concludes: "It is a sad paradox that the institutions most clearly dedicated to helping adult learners to learn are such slow learners themselves" (p. 47).

Even Senge himself has some discouraging words. Asked by O'Neil (1995) whether schools are LOs, he answered: "Definitely not" (p. 20). He finds that most teachers are oppressed by trying to conform to rules, goals, and objectives. Schools are build on the model of passive ingestion of information, and the educational enterprise is fragmented and stratified. Although cooperative learning is often advocated for students, "the idea that teachers and administrators ought to learn together really hasn't gone too far" (ibid.).

Bridging the Gap

What barriers prevent the learning organization from becoming a reality? "One of the barriers to the successful creation of generative learning organizations is the lack of effective leaders" (Murrell and Walsh 1993, p. 295). The learning organization requires a fundamental rethinking of leadership. Leaders become designers, teachers, and stewards of the collective vision (Senge 1990). Managers must change the belief that only they can make decisions, and employees must change the belief that they don't have to think on the job (Honold 1991). Leadership in an LO is the ability to coach and teach; it is not exclusive, authoritative, or assumed, but learned and earned. "Effective leadership may emerge anywhere true learning is taking place" (Gratton 1993, p. 100).

Inquiry and dialogue can be threatening; people are typically not rewarded for asking tough questions or identifying complex problems (Gratton 1993). Other barriers cited by Watkins and Marsick (1993) include the inability to recognize and change existing mental models, learned helplessness, tunnel vision, truncated learning (incomplete transfer of past learning), individualism, and a culture of disrespect and fear. They assert that a learning organization cannot be created in an atmosphere of layoffs, downsizing, "retirement on the job," and a part-time, overtaxed, temporary work force.

The LO in Sight

It seems that the concept of the learning organization is clear enough to some to be putting it into practice; to others, it is fuzzy and amorphous and needs critical attention. However, useful insights can still be drawn from theory and practice. The learning organization is best thought of as a journey, not a destination (P. West 1994), a philosophy, not a program (Solomon 1994). Few would argue that bureaucracy, Taylorism, or passive learning are the best ways to work and learn in the world today. The LO has a lot to offer to the reform and restructuring of organizations, but building one is clearly an enormous task. However, one can begin with the attitude that learning is "a sustainable resource, not a limited commodity" (May 1994, p. 53) and work on developing the mindset of a culture of learning. It must be recognized that the visioning process is ongoing, not a one-time event (O'Neil 1995).

The learning organization—myth or reality? "There is no such thing as a learning organization. . . . It's a vision that sees the world as interdependent and changing. A learning organization is always evolving" (Solomon 1994, p. 59). "You never arrive. . . . You can never say 'We are a learning organization'" (Hammond and Wille 1994).

References

Calvert, G.; Mobley, S.; and Marshall, L. "Grasping the Learning Organization." *Training* 48, no. 6 (June 1994): 38-43. (ERIC No. EJ 484 475)

Duden, N. "A Move from Effective to Quality." *School Administrator* 50, no. 6 (June 1993): 18-21. (ERIC No. EJ 465 273)

Dumaine, B. "Mr. Learning Organization." *Fortune* 130, no. 8 (October 17, 1994): 147-157. (ERIC No. EJ 490 452)

Gratton, M. "Leadership in the Learning Organization." *New Directions for Community Colleges* 21, no. 4 (Winter 1993): 93-103. (ERIC No. EJ 479 918)

Hammond, V., and Wille, E. "The Learning Organization." In *Gower Handbook of Training and Development, 2d ed.*, edited by J. Prior. Brookfield, VT: Gower, 1994.

Honold, L. "The Power of Learning at Johnsonville Foods." *Training* 28, no. 4 (April 1991): 55-58.

Isaacson, N., and Bamburg, J. "Can Schools Become Learning Organizations?" *Educational Leadership* 50, no. 3 (November 1992): 42-44. (ERIC No. EJ 454 329)

Jacobs, R. L. "Impressions about the Learning Organization." *Human Resource Development Quarterly* 6, no. 2 (Summer 1995): 119-122.

Kuchinke, K. P. "Managing Learning for Performance." *Human Resource Development Quarterly* 6, no. 3 (Fall 1995): 307-317.

May, S. "Beyond 'Super Secretary' Courses." *Canadian Journal of University Continuing Education* 20, no. 2 (Fall 1994): 45-54. (ERIC No. EJ 495 823)

Murrell, P. H., and Walsh, J. P. "Leadership Development at Federal Express Corporation." *Human Resource Development Quarterly* 4, no. 3 (Fall 1993): 295-302. (ERIC No. EJ 473 917)

O'Neil, J. "On Schools as Learning Organizations." *Educational Leadership* 52, no. 7 (April 1995): 20-23. (ERIC No. EJ 502 905)

Senge, P. *The Fifth Discipline.* New York: Doubleday, 1990.

Shields, C., and Newton, E. "Empowered Leadership." *Journal of School Leadership* 4, no. 2 (March 1994): 171-196. (ERIC No. EJ 483 293)

Smith, G. J., and Stodden, R. A. "Restructuring Vocational Special Needs Education through Interdisciplinary Team Effort." *Journal for Vocational Special Needs Education* 16, no. 3 (Spring 1994): 16-23. (ERIC No. EJ 482 768)

Solomon, C. M. "HR Facilitates the Learning Organization Concept." *Personnel Journal* 73, no. 11 (November 1994): 56-66.

Watkins, K. E., and Marsick, V. J. *Sculpting the Learning Organization.* San Francisco: Jossey-Bass, 1993.

West, P. "The Learning Organization: Losing the Luggage in Transit?" *Journal of European Industrial Training* 18, no. 11 (1994): 30-38. (ERIC No. EJ 497 198)

West, W. "Learning Organizations: A Critical Review." In *Proceedings of the Midwest Research-to-Practice Conference,* edited by L. Martin. Madison: University of Wisconsin, 1994. (ERIC Document Reproduction Service No. ED 378 359)

Developed with funding from the Office of Educational Research and Improvement, U.S. Department of Education, under Contract No. RR93002001. Opinions expressed do not necessarily reflect the position or policies of OERI or the Department. *Myths and Realities* may be freely reproduced.

CENTER ON EDUCATION AND TRAINING FOR EMPLOYMENT
THE OHIO STATE UNIVERSITY
1900 KENNY ROAD • COLUMBUS, OHIO 43210